



Innovations to Intake

2008 TIG Conference

Hugh Calkins
Eve Ricaurte
Cynthia Vaughn

Friday, February 1, 2008



Maine

Legal Matters - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.vlp.org/xforms/legalMatters

Latest Headlines PTLA VLP HML KIDS LSE MEJ Mega ZMI MAIN MIE NLADA LSC RIN News LS Tech OST NTAP

Content Administration Zope on http://m11080.kaivo.com Legal Matters Legal Services for the Elderly

Maine Volunteer Lawyers Project


Welcome to the Maine Volunteer Lawyers Project online legal assistance gateway. Please read these instructions for information on how to use this service.

- Click on the legal matter that pertains to you.
- If you select a legal matter that the VLP may be able to assist you with, you will be sent to an online form that will require your completion.
- If you select a legal matter that the VLP cannot help you with, you will be given a list of resources that may be of assistance to you.
- If you have completed the online forms for one matter, but have another legal matter, you will be given the opportunity to come back to the legal assistance gateway and repeat the process.



Family Law

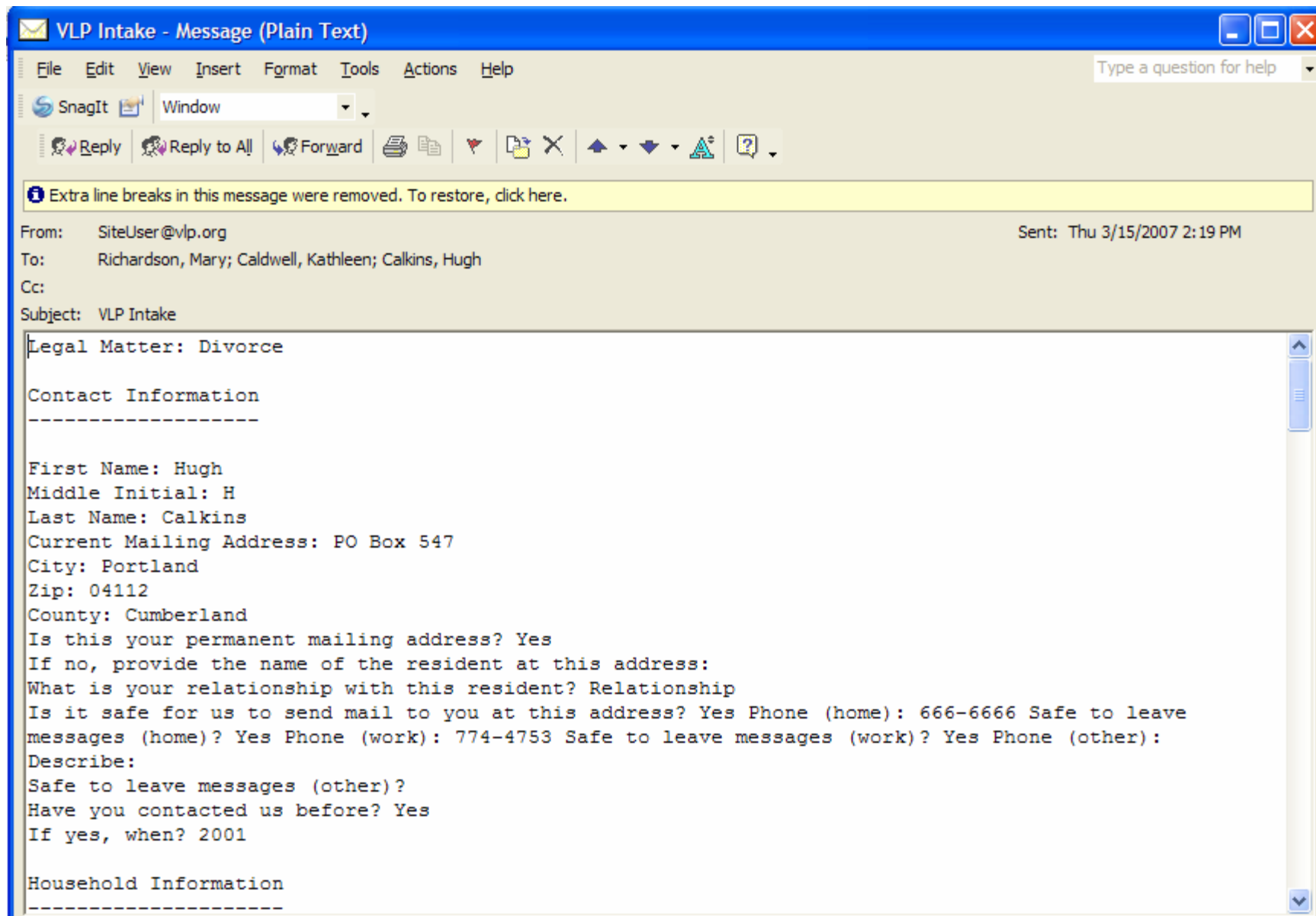
- [Divorce](#)
- ▶ Enforcement or Contempt of Family Law Orders
- ▶ Modification of Family Law Orders
- ▶ Protection from Abuse
- ▶ Unmarried Parental Rights & Responsibilities
- ▶ Click here if your legal matter is not listed.



Public Benefits

- ▶ Social Security Disability / Not Receiving Benefits
- ▶ Social Security Disability Termination
- ▶ Unemployment Compensation
- ▶ Click here if your legal matter is not listed.

http://www.vlp.org/xforms/divorce/divorceIntake



VLP Intake - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.vlp.org/xforms/divorce/divorceIntake

Latest Headlines PTLA VLP HML KIDS LSE MEJ Mega ZMI MAIN MIE NLADA LSC RIN News LS LSTech OST NTAP

Content Administration Zope on http://m11080.kaivo.com VLP Intake Legal Services for the Elderly

Online Form

Welcome to the Maine Volunteer Lawyers Project online intake form. Please read the instructions for information about the form and how to complete it.

Online Form Instructions and Information

1. The online form is designed to collect information about you that will enable us to determine if and how we can help you.
2. Please answer all of the questions within this form.

What is your legal matter?

First name

Middle Initial

Last Name

Current Mailing Address

City

Zip

County

Is this your permanent mailing address?

If no, provide the name of the resident at this address

- What is your relationship with this resident?

Is it safe for us to send mail to you at this address?

Please provide one or more phone numbers where we can reach you (Mon - Fri: 9am - 4pm).

Phone (home)

Legal Matter

Relationship

Select County

Yes No

Yes No

Done

Matter Intake Sheet (9.0.4.1)

Applicant 1 Eligibility 2 Title III 3 Adverse 4 Spouse 5 Case Info 6 Closing 7

| | | | | | |
|--|---------------|------------------------|------------------|--------------|------------|
| Applicant is <input checked="" type="radio"/> Individual <input type="radio"/> Organization | | Social Security Number | - - | Alien Number | |
| Title | First Name | Middle | Last Name | Extension | Prof. Ext. |
| | | | | | |
| Salutation | Date Of Birth | Age | Gender | | |
| | | | | | |
| Address: | | | Occupation | | |
| Line 1 | | | | | |
| Line 2 | | | Primary Language | | |
| Line 3 | | | | | |
| City | State | ME | | | |
| Zip | County | | | | |
| Country | Phone () - | Ext | | | |
| | Fax () - | | | | |
| Nickname | | Direct Dial () - | Ext | | |
| Pager | | Direct Fax () - | | | |
| Mobile/Cell () - | Ext | E-mail address | | | |

Copy From

Import Intake

Exit Intake



Ohio

lawolaw.org - Bounce Back Form - Windows Internet Explorer

http://www.ablelaw.org/index.php?option=com_facileforms&Itemid=555class=

Google

lawolaw.org - Bounce Back Form



“Legal Aid helped me find justice.”



Advocates for Basic
Legal Equality, Inc.

Legal Aid of
Western Ohio, Inc.

Legal Aid Line of Western Ohio

APPLY FOR HELP FROM LEGAL AID LINE OF WESTERN OHIO

In most cases, **Legal Aid Line** can provide service only to people who live in one of the following Ohio counties, or have a legal problem which must be resolved within one of these counties:

| | | | | | |
|-----------|----------|--------|------------|----------|---------|
| Allen | Darke | Hardin | Miami | Richland | Wood |
| Ashland | Defiance | Henry | Montgomery | Sandusky | Wyandot |
| Auglaize | Erie | Huron | Ottawa | Seneca | |
| Champaign | Fulton | Logan | Paulding | Shelby | |
| Clark | Greene | Lucas | Preble | VanWert | |
| Crawford | Hancock | Mercer | Putnam | Williams | |

If you do not live in one of these counties, or do not have a case which must be resolved in one of these counties, then Legal Aid Line probably cannot assist you. To find legal services programs which serve Ohio counties other than the ones listed above, you call toll-free 1-866-LAW-OHIO or [click here](#).

If you do not wish to ask for help through this web site, you can call us at (419) 724-0460 in the Toledo area, or 1-888-534-1432 from elsewhere in Ohio or the United States.

If you ask for help by using this web site, we will make every effort to contact you at the phone number you give to us within two business days after we receive your request. If you do not hear from us within two business days, please contact us by phone or return to this web site to submit a new request for help.

WHAT COUNTY DO YOU LIVE IN?

Select County

APPLY FOR HELP NOW



Together, we do the community justice.

start

lawolaw.org - Bounce...



10:52 AM



Legal Aid of
Western Ohio, Inc.

“Legal Aid helped me
when no one else could.”



Advocates for Basic
Equality, Inc.

Legal Aid Line of Western Ohio

APPLY FOR HELP FROM LEGAL AID LINE OF WESTERN OHIO

Step 1: Privacy Notice

Step 2: Personal Info

Step 3: Legal Info

STEP 2: Please tell us about yourself and how we can contact you.

Special note: Items shown in **bold** on the form are required and must be filled in.

WHAT IS YOUR NAME?

First Name

M.I.

Last Name

WHAT IS THE BEST ADDRESS WE CAN USE TO SEND MAIL TO YOU?

Street Address or P.O.Box

Apt.# or Lot #

City

State

Zip Code

IS THE ABOVE THE SAME ADDRESS WHERE YOU LIVE?

☐ Yes ☐ No

IF NO, THEN AT WHAT ADDRESS DO YOU LIVE?

Street Address or P.O.Box

Apt.# or Lot #

City

State

Zip Code

WHAT IS THE BEST PHONE NUMBER WE SHOULD USE TO CALL YOU?

Please note: To protect your privacy so that others do not find out you have contacted a law office, our telephones do not send out a Caller ID signal. Please make sure the phone number you give to us does not use Privacy Manager or similar systems to block calls. Otherwise, we may be unable to reach you at the number you give to us.

Area Code

Phone Number

IS THIS NUMBER YOUR:

- ☒ Home Phone
☐ Work Phone
☐ A phone where we can leave a message for you



lawolaw.org - Bounc...

Presenter_Outline_...

Designing a Remote...

LivePerson - LP-770...

Calendar - Microsoft...

Microsoft PowerPoin...

10:58 AM



North Dakota

Application for Services
Legal Services of North Dakota
State Bar Association of North Dakota - Volunteer Lawyer Program & Reduced Fee Program

Please fill out the application completely and push the submit button when you are finished. You will receive an e-mail confirmation that your application has been submitted after the submit button is pushed. You will receive a response via phone or letter within seven (7) working days. You will only receive 20 minutes to complete this application. If it will take longer than 20 minutes to complete the application including the description, you may want to type your description in Notepad or Wordpad first, then complete the application and paste the notes into the description before you submit.

| Required Information * Application will not submit without information | | | |
|--|----------------------|--|----------------------|
| First Name * | <input type="text"/> | Last Name * | <input type="text"/> |
| Spouse's First Name (Optional) | <input type="text"/> | Spouse's Last Name (Optional) | <input type="text"/> |
| Mailing Address * | <input type="text"/> | City * | <input type="text"/> |
| State * | <input type="text"/> | Zip Code * | <input type="text"/> |
| Area code and Day time Phone # (8:30 a.m. to 4:30 p.m.) | <input type="text"/> | | <input type="text"/> |
| Marital Status * | <input type="text"/> | Are you a US Citizen * | <input type="text"/> |
| Birthdate * mm/dd/yyyy | <input type="text"/> | Where do you live? * | <input type="text"/> |
| Race (Optional) | <input type="text"/> | E-mail address * | <input type="text"/> |
| How many children in household? * | <input type="text"/> | Sex * | <input type="text"/> |
| Where did you learn about Legal Services * | <input type="text"/> | How many adults in household? Include yourself. * | <input type="text"/> |
| First name of person giving you problems: (75 characters max) * | <input type="text"/> | Social Security #: (Optional) | <input type="text"/> |
| | | Last name or business name of party giving you problems: (75 characters max) * | <input type="text"/> |
| A short description of the problem you are having: | | | |
| <input type="text"/> | | | |



Maine



Basic Intake Module

Do not use your browser's back button. You will lose all of your data

Please fill out the contact information below and click next to go to the next screen

First Name*

Middle Initial

Last Name*

Please provide one or more telephone numbers where we can reach you,
weekdays, 9:00 am to 4:30 pm.

Is It Safe to Leave Messages at this Number?



Home Phone:

☐ Yes ☐ No

Work Phone

☐ Yes ☐ No

Cell Phone

☐ Yes ☐ No

Phone (Other)

☐ Yes ☐ No

Fields Marked with an * are required

Next



Basic Intake Module

Do not use your browser's back button. You will lose all of your data

Please fill out the contact information below and click next to go to the next screen

First Name*

Middle Initial

Last Name*

Please provide one or more telephone numbers where we can reach you, weekdays, 9:00 am to 4:30 pm.

Is It Safe to Leave Messages at this Number?



Home Phone:

☒ Yes ☐ No

Work Phone

☐ Yes ☐ No

Cell Phone

☐ Yes ☐ No

Phone (Other)

☐ Yes ☐ No

Fields Marked with an * are required

Next



Basic Intake Module

Do not use your browser's back button. You will lose all of your data

Current Mailing Address

Street Address*

City*

State

Zip Code*

County

Country

Is this your permanent mailing address?* ☒ Yes ☐ No

Is it safe to send mail to this address?* ☐ Yes ☐ No Required

Email Address:

Have You Contacted Us Before?* ☐ Yes ☐ No Required

Fields Marked with an * are required

Basic Intake Module

Do not use your browser's back button. You will lose all of your data

Please enter the total actual value of your bank and retirement accounts ?

| | |
|-----------------------|-----------------------------------|
| Money Market Accounts | <input type="text"/> |
| Checking Accounts | <input type="text" value="1250"/> |
| Savings Accounts | <input type="text"/> |
| Pensions | <input type="text"/> |
| IRA/401K/Other | <input type="text"/> |
| Stocks and Bonds | <input type="text"/> |
| Loans Owed To | <input type="text"/> |

Please list any other property ?

our primary residence ?

Type

Land/Real Estate ? Type

Collectibles: ? Type

Type

incomeWaiver

Client is over 200% of poverty.
Monthly income is 4000



Basic Intake Module

Do not use your browser's back button. You will lose all of your data

| | |
|----------------------------|--|
| Volunteer Name:* | <input type="text" value="Sally"/> |
| Problem Summary:* | <input type="text" value="here's the deal"/> |
| Action Summary:* | <input type="text" value="Here's what I did"/> |
| <div>Previous Submit</div> | |

Maine Volunteer Lawyers Project

[Get Legal Help](#)[Volunteer for VLP](#)[About VLP](#)[Volunteer Resources](#)[About Pro Bono](#)

VLP Staff Intake Module

None Your intake has been successfully uploaded. [Click here to print it out.](#)

[Home](#) | [Contact Us](#) | [Feedback](#) | [FAQ](#) | [Terms of Use](#) | [Privacy Policy](#) | [Legal Disclaimer](#) | [Site Map](#) | [Printable Page](#) | [PTLA](#) | [Admin Menu](#)

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(Phone) (207) 774-4348 (800) 442-4293 | (Fax) (207) 828-2300

William Wise (DOB: 1955-003-4)

Intake Date:2008-01-15

Address

123 4th Street
Portland, ME 04101 (undefined County)
USA

Telephone Numbers

Home: (207) 774-4753-(Safe to Call)

Gender: Male
Ethnicity: undefined
Marital Status: married
Citizenship: USA

Financial Information

Adults: 2 Children: 1

Income

Self-Employment: 42000 Yearly (earned by William Wise)
undefined: 6000 Yearly (earned by Wendy)
undefined: 0 Yearly (earned by Wayne)

Assets

Cash - Bank Account (Checking or Savings):1250(Liquid:Yes)

For information on vehicles or if the client entered multiple bank account information, see [notes](#) section.

Debts

Expenses

Case Information

Problem Type:

Notes

Telephone Notes: Home telephone: Safe to Call Address Notes: It is safe to send mail to this address.Household Information: William Wise(self,age 47) Wendy(Spouse,age 45) Wayne(Biological or Adopted Child,age 15)Client's current living arrangement: In a rented home/apartment Vehicles: Passenger Cars/Trucks1; Motorcycles: 0; Boats: 0; Commercial Vehicles: undefined; Recreational Vehicles: 0.Summary of Problem (entered by Sally Smith):Here's the problem.Summary of Action (entered by Sally Smith):Here's what I did

Adverse Party

David Johnson
Portland, ME
Date of birth: --

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
- <ClientIntake>
- <ClientIdentification>
  <ClientIdentifier>Wise1152008</ClientIdentifier>
- <PersonInformation>
  - <PersonName>
    <FirstName>William</FirstName>
    <MiddleName/>
    <LastName>Wise</LastName>
    <FullName>William Wise</FullName>
  </PersonName>
  - <Address>
    <AddressLine>123 4th Street</AddressLine>
    <City>Portland</City>
    <State>ME</State>
    <PostalCode>04101</PostalCode>
    <Country>USA</Country>
  </Address>
  - <Telephone Type="home">
    <TelephonePrefix>207</TelephonePrefix>
    <TelephoneNumber>774-4753</TelephoneNumber>
    <TelephoneNotes>Safe to Call</TelephoneNotes>
    <FullTelephone>(207) 774-4753</FullTelephone>
  </Telephone>
  <BirthDate>1955-003-4</BirthDate>
  <Email/>
  <Sex>Male</Sex>
  <Age>47</Age>
  <Ethnicity>undefined</Ethnicity>
  <PrimaryLanguage>en</PrimaryLanguage>
  <MaritalStatus>married</MaritalStatus>
  <Citizenship>USA</Citizenship>
  </PersonInformation>
</ClientIdentification>
- <ClientEligibility>
  <Adults>2</Adults>
  <Children>1</Children>
- <AssetWrapper>
  - <Asset>
    <AssetAmount>1250</AssetAmount>
    <AssetType>Cash - Bank Account (Checking or Savings)</AssetType>
    <Liquid>Yes</Liquid>
  </Asset>
</AssetWrapper>
- ...
```



lowa

Home

The Iowa Legal Aid Website (ILAW)

Need help finding information?

Click here to chat with a live person



Welcome to the Self Help Center at iowalegalaid.org

Welcome to the Self Help Center at iowalegalaid.org. Follow each of the steps in order to find information about the law and your legal rights. Start with the tour of iowalegalaid.org. After the first two steps, if you have not found what you need, go to Step 3. Use LiveHelp whenever you need help.

3 Easy Steps

1

2

3

1



Tour of iowalegalaid.org

Click on this button to watch a video on how to find information on the iowalegalaid website

2

Find information about the law and your legal rights

Click on this button to look for information on our website. You can find information on many legal topics.

3



Still need help?

Click on this button if you did not find the answer or information you need.

Iowa Legal Aid cannot give you legal advice by email or on LiveHelp. If you have an emergency or deadline, contact Iowa Legal Aid or another attorney right away.

[Disclaimer](#) | [Admin Login](#)

powered by [probono.net](#)

Self Help Center - Win... Welcome to ILAW - Windows Internet Explorer

http://www... http://www.iowalegalaid.org/IA/index.cfm

Welcome to ILAW

Iowa Legal Aid Website
Working for Fairness

Feedback | ILAW News

[National LawHelp](#) | [Referral Finder](#) | [About this Website](#) | [Legal Aid Directory](#)

Welcome! To get started, click a topic below.
Click [here](#) to see a short video on how to use this site.
If you need more help finding information, [click here to chat with Iowa Legal Aid.](#)

Need help finding information?
Click here to chat with a live person

60+ Elder Law
Consumer, Finance, Health Care, Wills, Life Planning...

Consumer and Small Claims Court
Cars, Loans, Utilities, ...

Disability
Rights of People with Disabilities

Education
Special Education, Discipline, Suspensions, ...

Family and Juvenile
Domestic Violence, Divorce, Child Custody...

Food Assistance and Other Food Programs
Sources of Help to End Hunger

Health
Resources for Iowans, Health Care Providers, and Social Service Agencies

Housing
Landlord-Tenant Problems, Public Housing, Foreclos

Individual Rights
Guardianship, Housing Discrimination, Other Discrimination Problems...

Pensions
Retirement, Pension and Benefit Programs

Public Benefits
Social Security, SSI, Welfare, ...

Veterans' Issues
Information and Resources for Iowa Service Members and Their Families

Work
Job Discrimination, Taxes and

Search
 [GO](#)
[Tips on Searching](#)

Special Bulletin


Storm Grant Program Will Help Winter Storm Victims
Disaster grants of up to \$3,319 to help Iowa's winter storm victims.

Car Buyer's Toolkit
Check out this new resource on the Iowa Legal Aid Website!

You Are Here
IA
[Choose Another Location](#)

Resources in Other Languages
[Bosnian](#)

start Self Help Center - Wi... Welcome to ILAW - ... Microsoft PowerPoint ... 10:59 AM



Home

The Iowa Legal Aid Website (ILAW)

Need help finding information?
Click here to chat with a live person

Self Help Center :: Step 3 - Windows Internet Explorer

http://www.iowalegalaid.org/flash/flash03.html

Welcome to the Self Help Center at iowalegalaid.org

3 Easy Steps

1 2 3

Still need help?

START HERE

Done Internet 100%

Disclaimer | Admin Login | powered by **probono.net**

iowa Legal Aid cannot give you legal advice by email or on LiveHelp. If you have an emergency or deadline, contact Iowa Legal Aid or another attorney right away.

start

Self Help Center - ...

Self Help Center :: ...

Iowa's Remote Inta...

2006_NLADA_Live_...

Calendar - Microsoft...

Microsoft PowerPoi...

1:31 PM

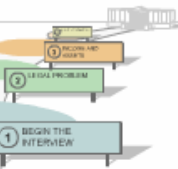
Welcome to the Iowa Legal Aid Self Help Center. This interview will let you apply for help from Iowa Legal Aid.

Use LiveHelp or click on 'Learn More' if you need help with this interview. Items with red labels must be filled in.

Click 'Begin' to start.

Begin

stop



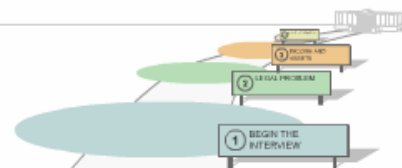
This program was developed under grants from the State Justice Institute (SJI grant number SJI-04-N-121), Center for Access to the Courts through Technology; Chicago Kent College of Law, Center for Computer-Assisted Legal Instruction (CALI), and Legal Services Corporation (LSC). The points of view expressed are those of the authors and do not necessarily represent the official position or policies of the SJI, Center for Access to the Courts through Technology, Chicago-Kent, CALI, or the LSC.

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SJI

- ☐ Applied for help with this problem in the past 30 days.
- ☐ Are a client of Iowa Legal Aid for this problem.
- ☐ Were a client of Iowa Legal Aid for another problem.
- ☐ Have never applied for help from Iowa Legal Aid

Continue



⇒ play



 IOWA LEGAL AID
SELF HELP CENTER

This program was developed under grants from the State Justice Institute (SJI grant number SJI-04-N-121), Center for Access to the Courts through Technology, Chicago Kent College of Law, Center for Computer-Assisted Legal Instruction (CALLI), and Legal Services Corporation (LSC). The points of view expressed are those of the authors and do not necessarily represent the official position or policies of the SJI, Center for Access to the Courts through Technology, Chicago-Kent, CALLI, or the LSC.

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SJI

Iowa Legal Aid Remote Intake - Windows Internet Explorer

https://npado.org/A2JViewer/ilaintake.html

Iowa Legal Aid Remote Intake

BACK FORWARD MY PROGRESS 9 I'm sorry Sam, if you have traffic tickets or criminal charge SOUND IS ON SEND FEEDBACK

a2j Access To Justice
AT CHICAGO-KENT COLLEGE OF LAW

I'm sorry Sam, if you have traffic tickets or criminal charges Iowa Legal Aid cannot help you.
Click here to find information on the Iowa Public Defender program. Click 'Goodbye' to look in the **Yellow Pages** online for a private attorney.

stop

What if I need to get my driver's license back?

Learn More

Goodbye Go back

1 BEGIN THE INTERVIEW

© 2000-2005 Illinois Institute of Technology - Chicago-Kent College of Law and the Center for Computer-Assisted Legal Instruction

start Iowa Legal Aid Remot... Microsoft PowerPoint ... 11:10 AM



Technical Information

Setting up A2J Author on Your Own Server & Processing XML Output for Alternative Use | A2J Auth - Windows Internet Explorer

http://www.a2jauthor.org/drupal/?q=node/157

Setting up A2J Author on Your Own Server & Processi...

the second example converts the XML object into a DOM object.

The last example saves the XML object as a file on the webserver.

These are provided for illustrative purposes. At this point, the user's interview data is on your website in LSXML format and ready for you to import into your database system.

```
graph LR; User[Website User/  
SRL/Pro Se] --> Viewer[a2j Viewer  
.a2j]; Viewer -- Submit --> Process[.anx + .xsl]; Process --> Output[.xml  
LSXML];
```

The download package contains all of the sample code mentioned above as well as the XSL file I created for the Iowa Intake Interview that transforms their interview into LSXML format. Here is a short description of all of the files in the package and their purpose...

start 2 Internet Expl... Inbox - Microsoft... Pika: Home Page ... LivePerson - LP-7... Microsoft PowerP... 11:37 AM

Setting up A2J Author on Your Own Server & Processing XML Output for Alternative Use | A2J Auth - Windows Internet Explorer

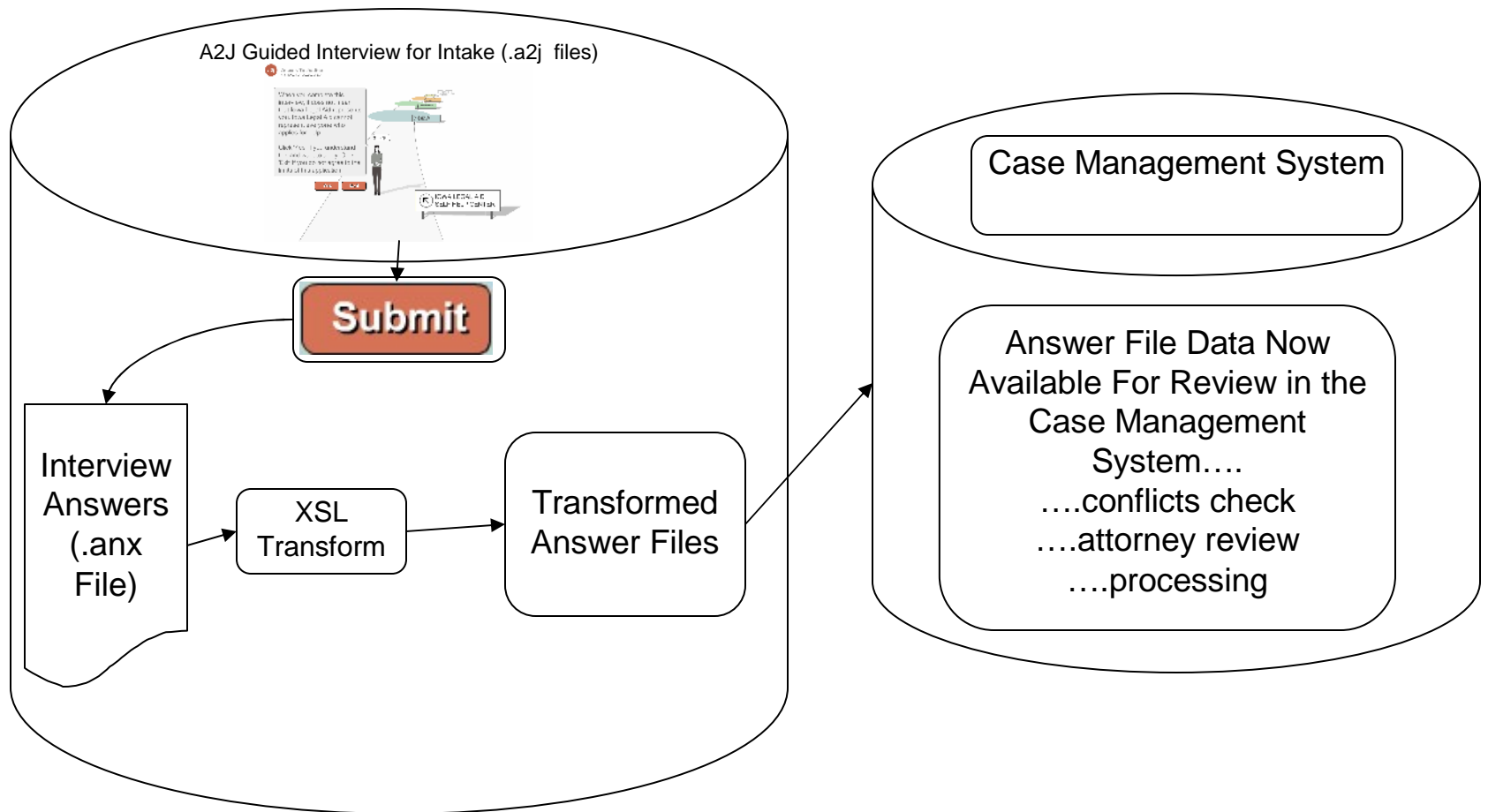
http://www.a2jauthor.org/drupal/?q=node/157

Setting up A2J Author on Your Own Server & Processi...

| | |
|--|---|
| \a2j\Server | directory |
| \a2j\Server\A2JGetData.php | sample PHP code showing how to load data into a previously run interview. |
| \a2j\Server\A2JSetData.php | sample PHP code showing how to catch interview data when the user hits SEND/SUBMIT. |
| \a2j\Server\interviews | directory |
| \a2j\Server\interviews\IowaIntake2LSXML.xml | xsl tranform file that converts the interview data from the Iowa Intake Interview into LSXML format |
| \a2j\Server\interviews\IowaIntakeInterview.a2j | Iowa Intake Interview .a2j file |
| \a2j\Server\shared | directory |
| \a2j\Server\shared\A2JLibrary.swf | used by A2JViewer.swf |
| | user by A2JViewer to list what avatars and languages are available and to show where |

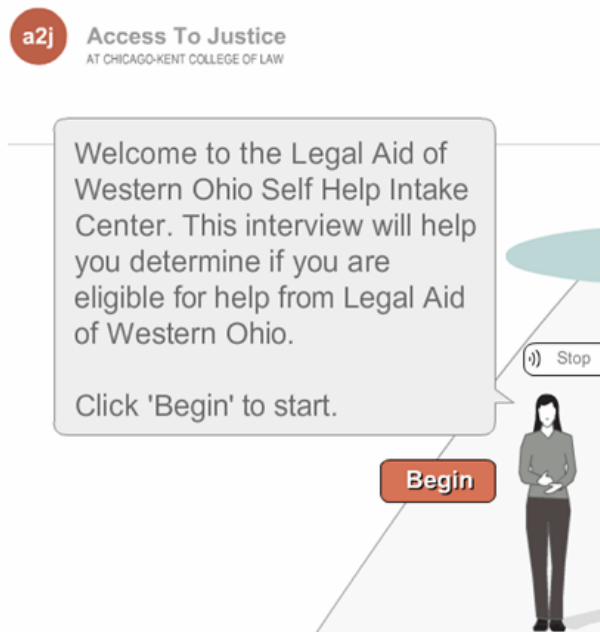
start | 2 Internet Expl... | Inbox - Microsoft... | Pika: Home Page ... | LivePerson - LP-7... | Microsoft PowerP... | 11:41 AM

Case Management System Data Collection



More of a Good Thing...

Ohio's Replication of Iowa's A2J Intake Template





LAWO's A2J Intake TIG

- Legal Aid of Western Ohio (LAWO) submitted a \$30,000 TIG application in 2007 in order to:
 - Provide the opportunity for all providers to “share” in the intellectual capital and investment made by Iowa and LSC;
 - Provide Ohio's legal services providers with 24/7 online intake capabilities via a link through the Ohio Legal Services statewide website;
 - Provide people in need with the ability to contact legal aid at all hours of the day and night.



Resources Involved in the Ohio LAWO A2J Intake Project

- Ed Marks, Litigation Director, Legal Aid of Western Ohio
- Debra Jennings, Supervising Attorney, LAWO
- LAWO and Statewide Intake Staff
- Cynthia Vaughn, Ty Acker, Jeffrey Fortkamp, Ohio Legal Assistance Foundation
- Rachel Medina, Chicago-Kent College of Law
- John Meyer, Center for Computer-Assisted Legal Instruction
- Will Shryock, Network Administrator, Advocates for Basic Legal Equality (ABLE)
- Aaron Worley, Pika Software (Case Management)



LAWO's A2J Intake TIG

- For LAWO, link from the statewide website will connect to a server within LAWO.

Access through Ohio Legal Services Statewide Website

Link for LAWO (and other participating providers) will be available under the “Find Ohio Legal Help” directory section of the Ohio Legal Services website.



Ohio Legal Services

Providing Legal Assistance To Low Income Ohioans

[HOME](#)

What is your legal problem?

[Search](#)

LAWO Dayton

LAWO DAYTON

Phone:
937-228-8088

Toll Free:
800-867-9431

Email:
bbrown@lawolaw.org

URL:
www.legalaidline.org

Address:
333 West First Plaza, Suite 500A
Dayton, OH 45402

Office Description:
LAWO Dayton

Office Hours:
8:30 a.m. to 5 p.m.

Client Intake Process:
call intake at 1-888-534-1432

Click here to complete the online intake application

Ease of Creating the LAWO Template



Access To Justice
AT CHICAGO-KENT COLLEGE OF LAW

Welcome to the Legal Aid of Western Ohio Self Help Intake Center. This interview will help you determine if you are eligible for help from Legal Aid of Western Ohio.

Click 'Begin' to start.

Begin

Stop

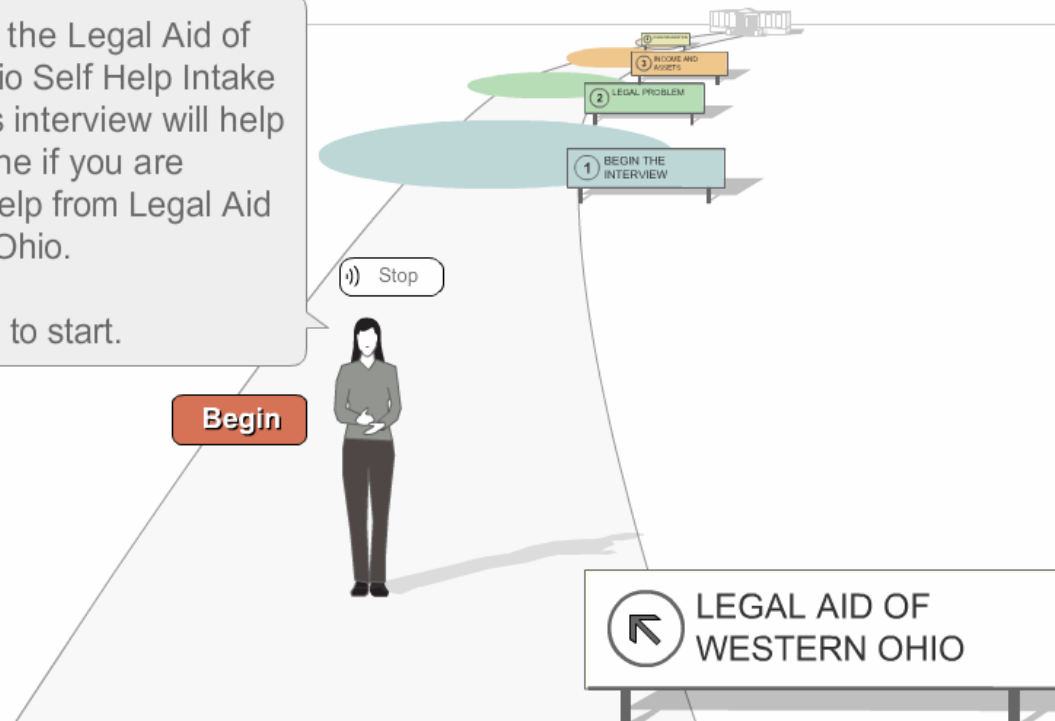
1 BEGIN THE INTERVIEW

2 LEGAL PROBLEM

3 REVIEW AND ASSESS



**LEGAL AID OF
WESTERN OHIO**





The “Script”...

- The script from Iowa’s initiative is being used as the “starting point” for the Ohio intake initiative.
- The script will be reviewed by all participating Ohio programs and will be edited based on the individual intake process for each program.



LAWO's A2J Intake TIG

- User will complete the interview; the information gathered from the interview will be passed to LAWO's Pika case management system, specifically into a staging area (pending review).

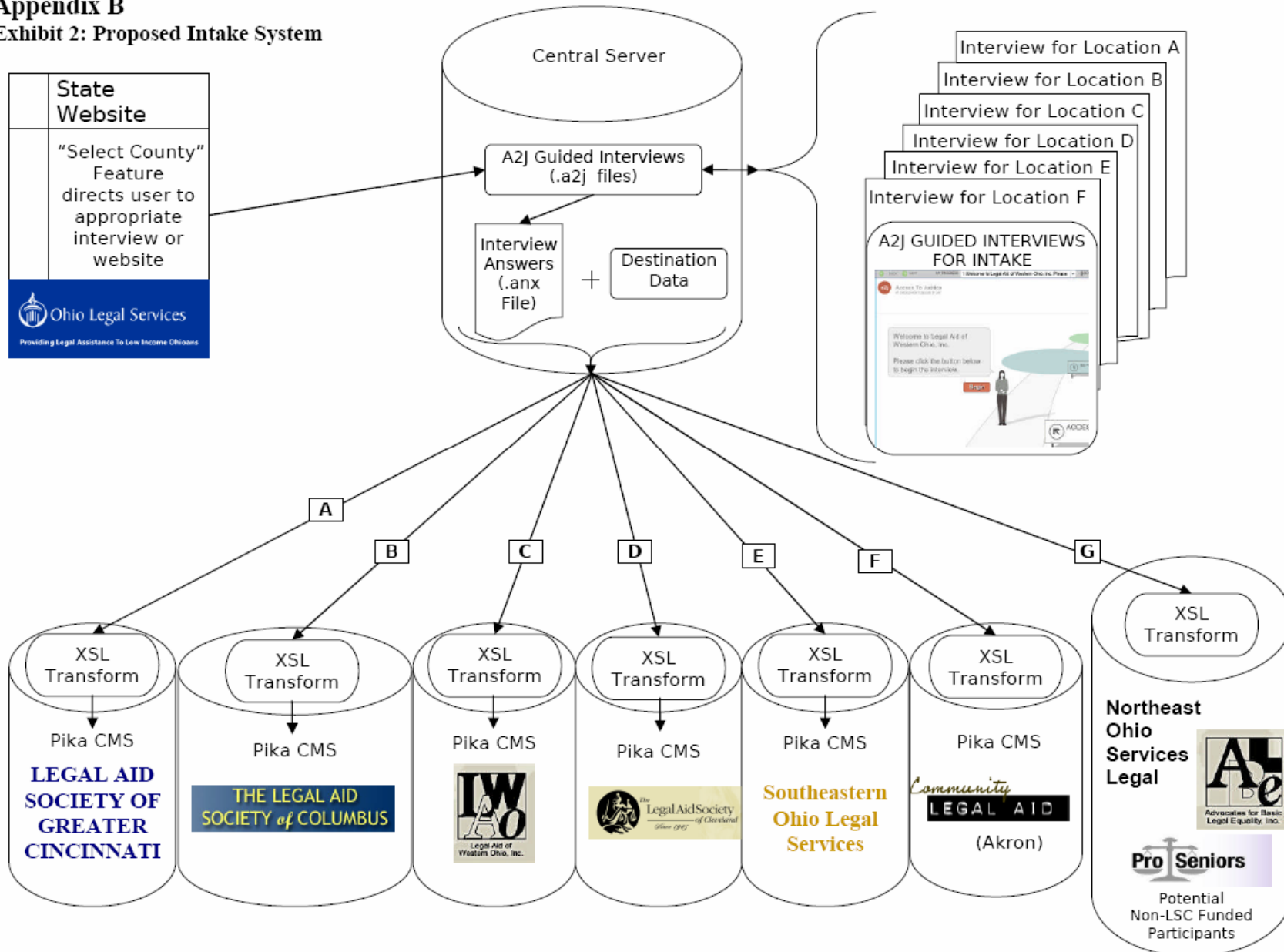


LAWO's A2J Intake TIG

- Staff at LAWO will review the information and process it just like they currently do with Hotline inquiries.

Ohio Web Intake

Appendix B Exhibit 2: Proposed Intake System





Project Management

- Best practices in project management will be applied to all stages and phases of the Ohio A2J Intake project.
- Actively using:
 - Microsoft Project
 - Issue Tracker (Kaivo tool)
 - GoToMeeting / GoToWebinar
 - Other: Poverty Law Survey Tool

LAWO A2J Intake Project Plan

| Task Name | Duration | Start |
|--|----------------|--------------------|
| Initial TIG Payment \$ 15,000 | 1 day | Wed 10/31/07 |
| Inception Phase | 56 days | Fri 10/5/07 |
| Review Iowa A2J Interview with Team | 1 day | Fri 10/5/07 |
| Initial Project Team Meeting | 1 day | Wed 10/17/07 |
| Identify Statewide Project Stakeholders from all Programs - Prepare Document | 1 day | Mon 11/19/07 |
| Send Stakeholders List to Executive Directors for Review | 25 days | Thu 11/1/07 |
| Download A2J Template to Desktop; Post Link Information to Issue Tracker | 1 day | Thu 11/29/07 |
| Project Team Meeting | 1 day | Thu 12/6/07 |
| Receive Revised Stakeholders List Back from ED's; Email Invites to Participants | 1 day | Thu 12/6/07 |
| Create Revised Project Plan for Specific Deliverables and Review with Project Team | 1 day | Thu 12/6/07 |
| Begin and complete contract negotiations with Chicago-Kent (\$10k) and CALI (\$8k) - Contract Samples to be provided by Rachel | 5 days | Mon 12/17/07 |
| Elaboration Phase | 45 days | Mon 1/7/08 |
| Setup test link in LAWO Pika Test Dev environment - Will be used for Pika testing | 5 days | Mon 1/7/08 |
| Work with Iowa / Michigan on Case Q for "staging tool" for Intake before populating Pika system | 45 days | Mon 1/7/08 |
| Conduct kickoff meeting with statewide stakeholders - Provide Iowa / Ohio Draft A2J demo & share intake interview | 1 day | Wed 1/9/08 |
| Rachel Medina (Chicago-Kent) trains all statewide and LAWO stakeholders on using A2J Author | 1 day | Wed 1/9/08 |
| Review draft A2J template and Interview Script with LAWO Stakeholders - Define requirements (deadline 1/18/08) | 5 days | Thu 1/10/08 |
| LAWO Stakeholders provide edits to the LAWO A2J Intake Interview Script to Project Team - Edits made by CV, TA or WS? | 5 days | Thu 1/17/08 |
| Approve final LAWO A2J intake script and log for prototype build | 1 day | Fri 1/25/08 |
| Construction Phase | 36 days | Mon 1/28/08 |
| Design new end logo from Court House to Legal Services - Work by Chicago Kent (may be part of A2J 2.0) | 5 days | Mon 1/28/08 |
| Create initial LAWO A2J prototype (Cynthia,Ty and/or Will) | 10 days | Mon 2/4/08 |
| Evaluate corresponding data elements of Pika with A2J for XSL Transform development (CALI) | 10 days | Mon 2/4/08 |
| Create LAWO XSL Transform (CALI) | 10 days | Mon 2/4/08 |
| Test XSL Transform and provide feedback to CALI | 5 days | Fri 2/15/08 |
| Project Team Discussion on tracking and measurement requirements and method | 1 day | Fri 2/15/08 |
| Setup Crystal Reports and Pika links in LAWO Pika Test Dev environment for reporting | 5 days | Mon 2/18/08 |
| Demo LAWO A2J Ohio Template to LAWO internal stakeholders | 1 day | Mon 2/25/08 |
| Make modifications to LAWO A2J Ohio Template based on LAWO internal stakeholders feedback | 5 days | Tue 2/26/08 |
| Complete LSC Quarterly Report - Send to Cindy Hurst for posting to LSC milestone website | 1 day | Tue 3/4/08 |

LAWO A2J Intake Project Plan *(continued...)*

| Task Name | Duration | Start |
|--|-----------------|--------------------|
| Draft Evaluation Plan and submit to Bristow Hardin for review | 10 days | Tue 3/4/08 |
| Submit LSC Milestone Report - Next Payment \$ 10,000 | 19 days | Tue 3/4/08 |
| Setup ABLE/LAWO Server to house A2J template | 1 day | Tue 3/4/08 |
| Second round demo to LAWO internal stakeholders | 1 day | Wed 3/5/08 |
| Demo Complete LAWO A2J Ohio Template to Statewide Stakeholders (for other programs) | 1 day | Thu 3/6/08 |
| Test Crystal Reports usage reporting - make edits as necessary | 5 days | Fri 3/7/08 |
| Put link to LAWO A2J template from the Ohio Legal Services website to the LAWO server | 1 day | Fri 3/14/08 |
| Test link to LAWO A2J Template - Ensure system is collecting data as detailed in requirements | 5 days | Mon 3/17/08 |
| Setup Pilot Site(s) to test A2J Template usage - Make modifications if necessary based on field input; psw protected | 5 days | Mon 3/24/08 |
| Transition Phase | 147 days | Mon 3/31/08 |
| Rachel Medina - Refresher Training of Statewide Stakeholders | 1 day | Mon 3/31/08 |
| Push LAWO A2J Intake "live" to link on LAWO server | 1 day | Tue 4/1/08 |
| Public announcement and PR campaign to announce new intake template (include media) | 5 days | Wed 4/2/08 |
| Complete Documentation for project for future reference | 5 days | Wed 4/9/08 |
| Begin work with other programs (first come, first out) to develop their interviews | 120 days | Mon 4/21/08 |
| Create project plans for each respective program development schedule | 120 days | Wed 5/7/08 |
| Begin creating test interviews for other programs as appropriate | 120 days | Wed 5/7/08 |
| Complete LSC Quarterly Report - Send to Cindy Hurst for posting to LSC milestone website | 1 day | Fri 5/30/08 |
| Submit LSC Milestone Report - Next Payment \$ 5,000 | 171 days | Fri 5/30/08 |
| Create XSL Transforms for other programs as appropriate | 10 days | Fri 5/30/08 |
| Identify where programs want their respective A2J template to reside (from link on statewide website) | 5 days | Fri 6/13/08 |
| Provide ongoing support and coordination of new program development as appropriate | 128 days | Thu 6/19/08 |
| Review intake template with Pro Bono staff statewide to determine if there is an interest in one for PB | 20 days | Mon 6/23/08 |
| Evaluate use of LiveHelp in LAWO pilot to assist users of the template with completion | 20 days | Fri 8/1/08 |
| Train other program staff on use of each respective A2J template | 10 days | Thu 12/18/08 |
| Complete Final Evaluation Report and Submit to LSC / Bristow Hardin | 15 days | Mon 1/5/09 |



Concerns about online intake

- Conflict checks
- Third party applications
- Inaccurate financial or other information
- Deadlines
- Missing contact information for applicant
- System flooded with applicants
- Privacy and data security



Benefits of Online Intake

- Increased access, especially in rural areas
- Increase customer service, particularly during times when staff are on vacation or sick or during staff shortages
- Decrease stress on staff by reducing the amount of time spent gathering basic information so they can help more people
- Less data entry, more time to work on real problems

Questions? Contact Information

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Slides available at <http://tig.lsc.gov>.